



BNA
Essential Information
Expert Analysis

Tax and Accounting Center

How To Use Interactive Forms

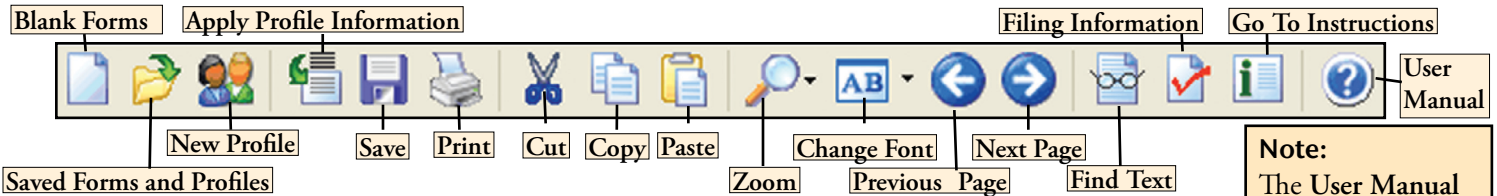
All BNA Interactive Tax Forms are government approved. To guarantee filing requirements are met, automated form processing requirements for barcodes, scanlines, validation fields, etc. are built in. New and updated forms are added to the collection as they are released by the issuing agencies. To access Tax Forms, click **Tax Forms** in the **Tax Forms** frame on a Home Page.

Tax Forms

[Tax Forms](#)

1. Toolbar

Explanatory tooltips describe the toolbar icons.



Note:

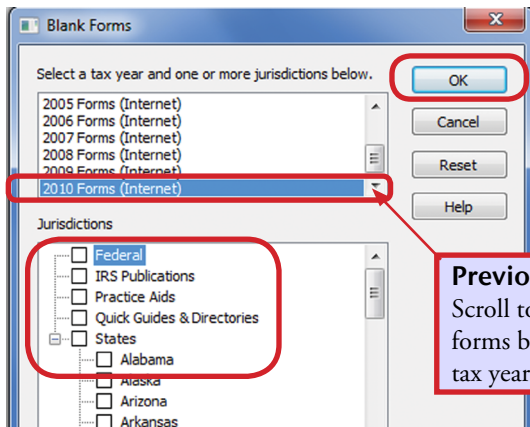
The User Manual contains in-depth information about all functionality. For Tutorials, go to Help/Tutorials.

2. Blank Forms

Click the **Blank Forms** icon. Choose a tax year and jurisdiction(s). Click **OK**. To open previously saved forms, click **Saved Forms and Profiles** on the toolbar. Click **OK**.

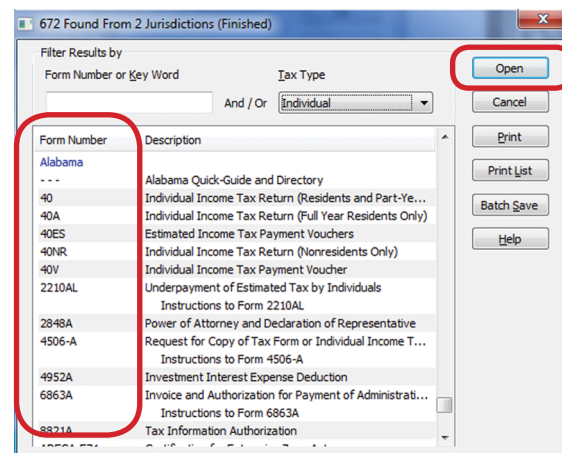
3. Select a Form

Locate forms by the form number, key word, or browse forms by tax type. Select the form(s) you wish to view, and click **Open**. Use the [Ctrl] key to simultaneously select multiple forms.

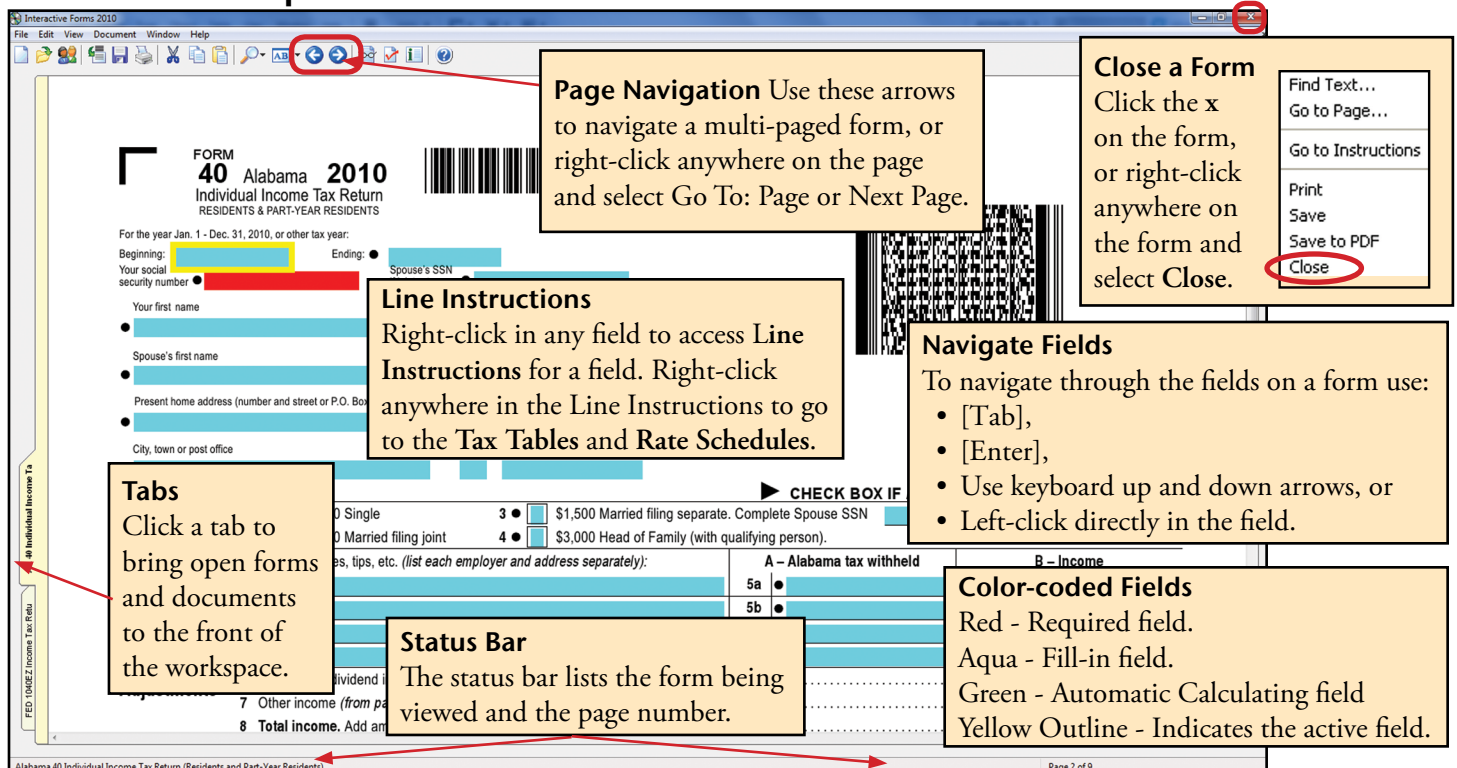


Previous Year's Forms

Scroll to locate blank forms back to the 2000 tax year.



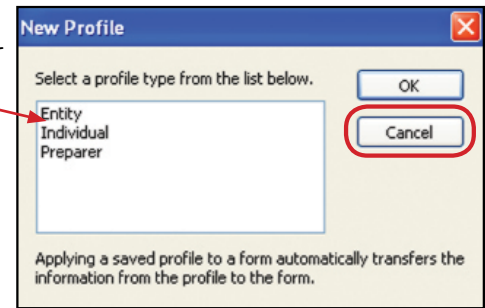
4. Forms Workspace



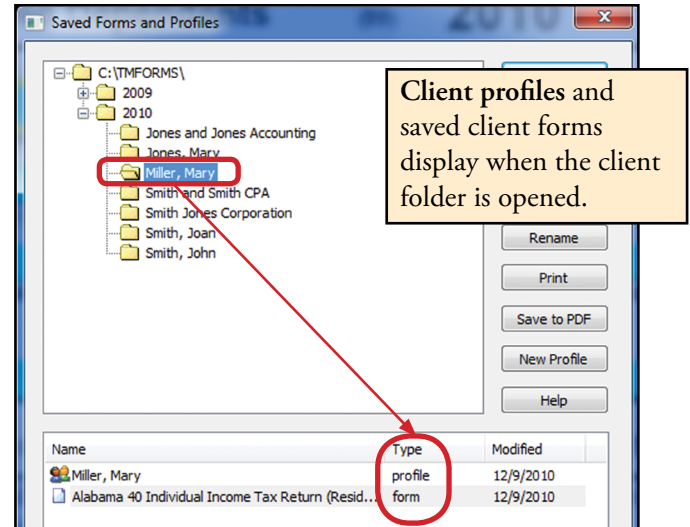
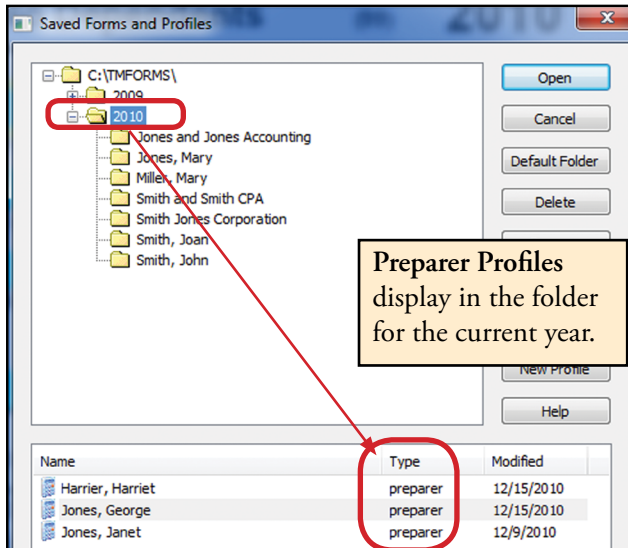
5. Profiles

- Profiles allow for the reuse of taxpayer information.
- To create a new profile, click the **New Profile** button  and select a profile type. Fill out the Profile template and save it. Forms and profiles save to the default TM Forms folder on your hard drive.
- Click **Apply Profile Information**  to apply a profile to a blank form. Open the client folder, select a profile in the bottom frame. Click **Open**.

To use **Saved Forms and Profiles**:

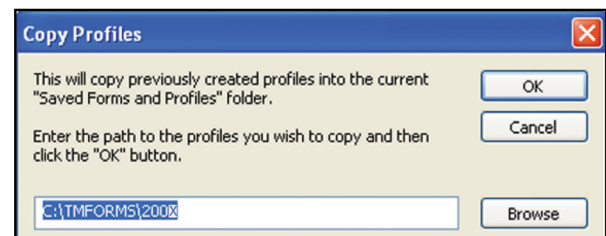
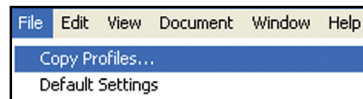


- Click  **Saved Forms and Profiles**.
- Select a client folder in the upper frame of the **Saved Forms and Profiles** window.
- The list of saved forms and profiles displays in the bottom frame of the **Saved Forms and Profiles** window.



Copy a Previous Year's Client Profiles to Current Year's Client Folders

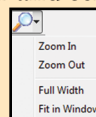
1. Click **File | Copy Profiles**.
2. The dialog box opens with the path to **previous year's forms**. (Browse to the previous year if it is NOT the previous year).
3. Click **OK**. Profiles are automatically copied to the current year's folder. If identical client names exist, information for each client is numbered (e.g., smith 2, smith 3, etc.) and placed (during import) in a data folder which may contain information and profiles for multiple clients.



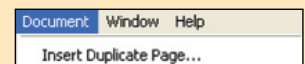
How Do I...

Add a Field to any form? Click **Edit** on the menu bar and select **Typewriter Field | Insert**.

Size the Text on a form? Click **Zoom** on the toolbar.

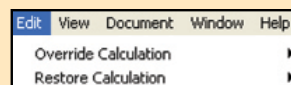


Insert a Duplicate Page? Save the form and click **Document | Insert Duplicate Page** on the menu bar. Note that duplicate pages should not contain any data or calculations before being duplicated, and may not be removed. **Duplicate pages do not contain the green calculating fields.**



Override or Restore Calculations

Click **Edit | Override Calculation** or **Restore Calculation**.



**For COMPLIMENTARY Research Help or Training – Contact BNA Training and Product Support
1-800-372-1033, option 5 , 8:30 AM – 7:00 PM ET, Mon. – Fri. (excluding most federal holidays).**

See www.bnatax.com for current tax information and BNA product descriptions.